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Reports for the Integrated Library System (ILS)

The MITRE Corporation

January 1979
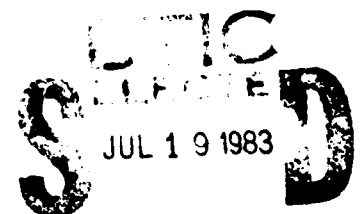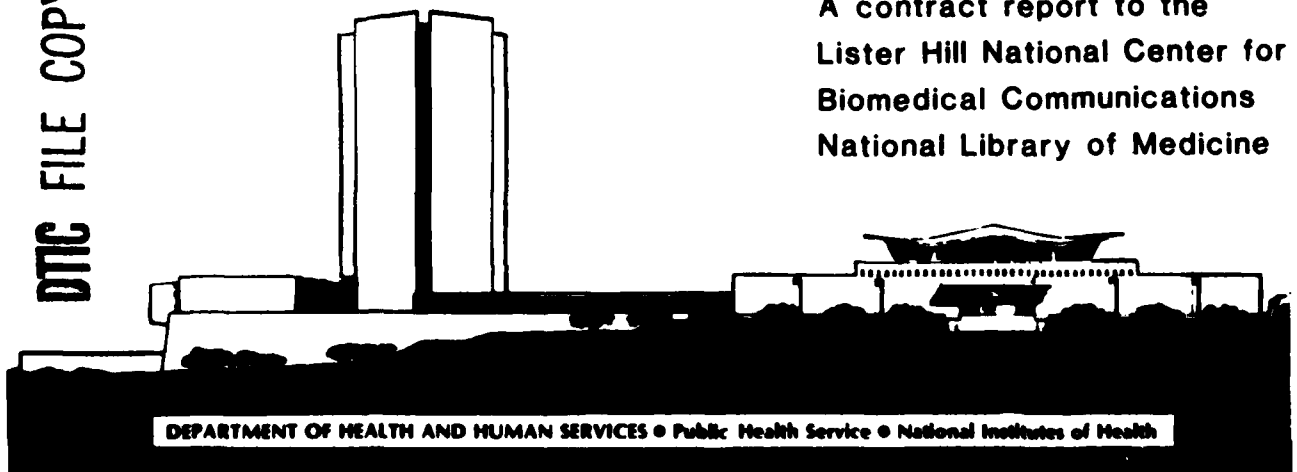
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A contract report to the
Lister Hill National Center for
Biomedical Communications
National Library of Medicine

DEPARTMENT OF HEALTH AND HUMAN SERVICES ● Public Health Service ● National Institutes of Health

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This document presents a series of reports developed for the circulation

16. Abstract (Limit: 200 words)

This document presents a series of reports developed for the circulation
module of the Integrated Library System (ILS). The ILS is a minicomputer-based
library system being developed by the Lister Hill National Center for Biomedical
Communications at the National Library of Medicine for use in medium-sized
libraries. The reports include correspondence related to circulation, biblio-
graphies, and management reports. The management reports have been developed in
cooperation with the Army Library, Pentagon, where the first module is being
implemented; however, they should be useful to other libraries planning to use the
ILS.

Each chapter in this document discusses a specific type of report - the
structure and use by the library administrator. For each report, data elements
are noted and alternative formats provided.

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Reports for the Integrated Library System (ILS)

J. Lovelace

January 1979

ABSTRACT

This document presents a series of reports developed for the circulation module of the Integrated Library System (ILS). The ILS is a minicomputer based library system being developed by the Lister Hill National Center for Biomedical Communications at the National Library of Medicine for use in medium-sized libraries. The reports include correspondence related to circulation, bibliographies, and management reports. The management reports have been developed in cooperation with the Army Library, Pentagon, where the first module is being implemented; however, they should be useful to other libraries planning to use the ILS.

Each chapter in this document discusses a specific type of report - the structure and use by the library administrator. For each report, data elements are noted and alternative formats provided.

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TABLE OF CONTENTS (Concluded)

LIST OF ILLUSTRATIONS

1.0 THE INTEGRATED LIBRARY SYSTEM

The Lister Hill National Center for Biomedical Communications
as the R&D arm of the National Library of Medicine is developing an
integrated minicomputer based library system (ILS). The circulation
module of the system is currently being implemented at the Army Library,
Pentagon. As part of the design of this first module, a series of reports
have been developed for both the circulation section and the adminis-
tration. This is not a complete set of reports in the sense that only
information from the circulation module is available; reports for
acquisitions or serials will be developed as those modules are de-
signed. Nevertheless, this set of reports constitutes an important
part of a library's total reporting system. It includes correspondence
such as overdue or reserve notices, bibliographies, and various manage-
ment reports. The process of developing these reports and their organ-
ization in this document are discussed below.

1.1 Development of the Reports

The reports described in this document reflect an appraisal of
current reporting systems and assumptions of what information is
needed by library administrators. Since the circulation module is
being implemented at the Army Library, its staff influenced the design
of reports. The following sections will describe in more detail the
contributions of the Army Library and the modifications required to
make the reports suitable for other libraries.

1.1.1 The Role of the Army Library

The Army Library staff contributed to the development of the re-
ports in several ways. First, the Monthly Activity Report required
for the Army proved to be a comprehensive listing of the library's
activities. This became a cornerstone of their set of reports.
Secondly, the staff was helpful in describing information they needed
to justify the decisions they made, (that is, whether to buy more
books in a specific topic or to eliminate multiple copies), and to aid

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them in planning. Finally, as individual reports were developed, the staff critiqued both content and format.

Not all the reports in this document were required by the Army Library. Some, such as the Recall Notice, will not be used because of administrative decisions. Nor would any library be likely to require all the reports. Furthermore, the report formats should not be regarded as fixed, but rather as suggestions to aid other libraries in using the reports writer which is part of the Integrated Library System.

1.1.2 Towards a Theory of Library Management

During the course of the project it became necessary to go beyond current reporting systems and to anticipate how the data collected by the system might be used not only for better control, but also for evaluation of services and prediction of future needs. Out of this process evolved several assumptions which are explained in greater detail below.

The first objective of a circulation system is better control of the collection. It must be able to determine the status of an item and predict its availability. Since items may be checked out to other than patrons -- example, reserve collections or bindery -- the reports include listings for the various status codes. Thus, there are reports for items sent to bindery, for those on extended loan as well as for those reported lost or missing. There are also status reports on patrons or those with VIP privileges. Libraries borrowing through ILL are special patrons and records are kept on their use.

Today evaluation is an issue for many libraries. There is an obligation to develop a balanced collection and an obligation to meet users' needs or demands. The evaluation of the collection traditionally has looked at the size of the collection and the number of items in each category. Sometimes the collection is measured against an ideal; for

example, a college library can measure itself against <u>Books For College</u> <u>Libraries</u>. Evaluation of services has involved users surveys (how many people out of the client population use the library, what services are used most often) and sometimes attitudinal questionnaires (rate the services performed by the library). Increases in circulation statistics or number of registered borrowers are also used as measures of performance.

These reports do not pretend to offer evaluation measures. Data for some evaluations are not available in the circulation module and may be too expensive to ever collect on a continuing basis. Nevertheless, evaluation of the collection and services has been an important concept and is reflected in the design of the management reports.

Lastly, there was an assumption that if libraries administrators are going to plan for changes in acquisitions, services, or clientele, they will need to use more of the tools of operations research. This means that historical data must be available. The ILS is capable of collecting some of this data. For example, it can clock the number of circulation transactions in a period; this information can then be used to assess the impact of cutting staff or adding a new terminal. These assumptions, then -- that the reports should provide control, help measure the library's performance, and collect histori:al data -- underlie the reports contained in this document.

1.2 Structure of this Document

The remainder of this paper is organized with one chapter for each report classification. Basically all reports would fall into one of the following categories:

- system back-up;

- correspondence;

- reports for patrons;

- management reports monitoring status of items on people;

- management reports monitoring activities; and

- reports on usage.

Each chapter describes the report type and the usefulness of specific
reports. Also a form has been designed (see Figure 1) to condense the
information. This form states the title, the estimated frequency of
generation and the purpose of the report; it identifies the data ele-
ments and computations required, and alternative ways of formatting.

```
┌─────────────────────────────────────────────────────┐
│                                                       │
│   NAME OF REPORT:                                     │
│                                                       │
│   FREQUENCY:                                          │
│                                                       │
│   PURPOSE:                                            │
│                                                       │
│     ┌────────────────────────┬────────────────────┐  │
│     │                        │                    │  │
│     │   DATA ELEMENTS USED   │    COMPUTATIONS     │  │
│     │                        │                    │  │
│     ├────────────────────────┼────────────────────┤  │
│     │                        │                    │  │
│     │                        │                    │  │
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│     └────────────────────────┴────────────────────┘  │
│                                                       │
│   FORMAT:                                             │
│                                                       │
│                                                       │
└─────────────────────────────────────────────────────┘
```

FIGURE 1
FORMAT FOR REPORT SUMMARIES

2.0 SYSTEM BACKUP

There are two reports to provide backup for the automated
circulation system. The first of these, the List of Patrons, is
kept up-to-date and used in the event of total system failure to
determine if a patron is a registered borrower in good standing. The
second report is a List of Inactive Patrons; it is generated yearly
or whenever the patron rolls are purged. The list may be reviewed
before purging or, if the purge is automatic, the list would be kept
for the archives where it could be checked if a patron claimed to have
registered, but his record was not present in the data base.

NAME OF REPORT: LIST OF PATRONS

FREQUENCY: Weekly or as warranted

PURPOSE: This report serves as a back-up in case of system failure.

DATA ELEMENTS USED	COMPUTATIONS
Name, rank or title Patron ID Patron status (valid or delinquent Expiration date for privileges (if applicable) Work phone Associated messages or restrictions on borrowing	

FORMAT: Two formats could be considered:

    a. Alphabetical listing by patron name arranged as follows:

Patron Name (rank or title) and Status	ID Number	Work telephone Number	Assoc. Message

    b. Separate listings for valid and invalid patrons (same headings except for status).

In both cases the reason for revoking privileges (delinquent borrower, fines owing or expiration of privileges) would be shown under associated messages.

NAME OF REPORT: LIST OF INACTIVE PATRONS

FREQUENCY: Biennially or less frequently

PURPOSE: This is an optional report for
                                    libraries that purge their patron
                                    rolls at intervals but wish to
                                    maintain a record of those patrons
                                    for their archives.

DATA ELEMENTS USED	COMPUTATIONS
Patron rank or title Name Address Data of record entry Date patron ID last used	Total

FORMAT: A listing in alphabetical order by patron name would be
most suitable for archival purposes since the most common use of
this report would be to check the list for a patron whose record
was no longer in the file.

3.0 CORRESPONDENCE

A major advantage of the circulation module of the ILS is the ability to generate correspondence relating to overdue or reserved books. All correspondence can be formatted so that the patron's name and address would be used in a window envelope. The correspondence described in this report includes:

- overdue notices;
- reserve notice;
- recall notice; and
- inventory reports.

3.1 Overdue Notices

There are three types of overdue notices. The first type is one most commonly used. It states that the following item was due on a given date and asks that it be returned to the library. The wording of the letter may be determined by the library administrator. If fines are assessed for overdue items, the amount owing may be shown. It is also possible to label the letter SECOND NOTICE or THIRD NOTICE, in accordance with the library's policy.

The second type of overdue notice is optional and entitled "Failure to Pay Fines." If patrons consistently return items late and fail to pay fines, the library administrator might consider using this report.

For borrowers who do not return items after repeated overdue notices there is a delinquent borrower's letter. Again, the text of the letter depends on the library's policy, but its purpose is to notify the patron that borrowing privileges will be revoked.

3.2 Reserve Notice

This too is a letter format. The text must state where the item is being held and until what date (or for how many days).

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3.3 Recall Notice

The recall notice requests the return of a book that is overdue or on extended loan. It is an optional report since many libraries prefer to telephone recall requests.

3.4 Inventory Reports

This is a very flexible report in that it gives a listing of items checked out to a patron account. Such "patrons" can include class reserves, items for a bookmobile or any temporary collection. It can be used as a check on interlibrary loans; in this case the borrowing library might be asked to acknowledge the items that were returned. In a college or university library this report could account for faculty loans or for items placed in a reserve collection for a specific class. Again, almost any library has VIP patrons who have extended borrowing privileges.

NAME OF REPORT: OVERDUE NOTICE (1st, 2nd and 3rd)

FREQUENCY: Generated daily or weekly depending on circulation period.

PURPOSE: To remind the patron that an item is overdue and should be returned to the library.

DATA ELEMENTS USED	COMPUTATIONS
Patron rank/title	
Name	Total number of items overdue
	Amount of fines owing
Due date	(Optional)
Check-out date (item last used)	
ITEM DESCRIPTION	
a. Author/title, call number,	
b. Journal title, volume, issue, copy	
c. Free text description	

FORMAT: Letter format with library letterhead and printed message stating that the following items are overdue (see Figure 2). It should be labeled SECOND NOTICE or THIRD NOTICE when appropriate. The patron's name and address should be printed so that a standard windowed envelope could be used.

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The Army Library, Pentagon
Room 1A518
Washington, D. C. 20310
Tel: 202-695-5413
Autovon 225-5413

(day's date)

The following materials charged to you to date are overdue. Please
return them immediately.

Call Number   Author   Title   Date Due

To: (patron rank) (patron name)

     (address)_____

     _____

FIGURE 2
SAMPLE OVERDUE NOTICE

NAME OF REPORT: OVERDUE NOTICE-FAILURE TO PAY FINES

FREQUENCY: Optional-as required

PURPOSE: This is an optional report used to
                                             collect fines from patrons who have
                                             returned books that were overdue,
                                             but failed to pay the fine.

DATA ELEMENTS USED	COMPUTATIONS

Patron rank/title
 	
ITEM DESCRIPTION
 	
a. Author, title, call number
 	
b. Journal title, volume,
    issue, copy
 	
c. Free text
 	
Data item returned and number of
  days overdue
 	
Amount of fine owed
	Fine assessment based on
	  number of items, length of time
	  overdue and the rate of
	  assessment

FORMAT: Correspondence with library letterhead and printed message
stating that these are unpaid fines on the following items. Below
the text the following information could be listed

Item Description	Date Returned	Number of Days Overdue	Amount of Fine

The patron's name and address should be printed so that a standard
windowed envelope could be used.

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NAME OF REPORT:	OVERDUE NOTICE-DELINQUENT BORROWER'S LETTER
FREQUENCY:	As required
PURPOSE:	To notify a patron that his privileges will be revoked if he does not return overdue materials (or pay fines)

DATA ELEMENTS USED	COMPUTATIONS
Patron rank/title	Fine assessment
Name	Total items overdue
Address	
ITEM DESCRIPTION	
a. Author/title, call number	
b. Journal title, volume, issue, copy number	
c. Free text description	
Date item checked out	
Date due	
Any fine assessment	

FORMAT: Letter format with library letterhead and list of items overdue. Text contains statement that privileges will be revoked. Patron's name and address printed to allow use of a windowed envelope for mailing.

NAME OF REPORT: RESERVE NOTICE

FREQUENCY: As required

PURPOSE: To notify a patron that an item he has requested is being held for him at the circulation or reserve desk.

DATA ELEMENTS USED	COMPUTATIONS
Patron rank or title Patron name Patron address ITEM DESCRIPTION a. Author/title, call number b. Journal title, volume, issue c. Free text	None

FORMAT: Letter format using library letterhead. Text states that the following item(s) is being held at (circulation desk) and after (three) days will be returned to the shelf. The description of the item would follow. The patron's name and address are positioned for display in a windowed envelope.

```
NAME OF REPORT:              RECALL NOTICE

FREQUENCY:                   On demand

PURPOSE:                     To retrieve an item that is over-
                             due or an extended loan whenever
                             another patron requests it.
```

DATA ELEMENTS USED	COMPUTATIONS
Patron title Patron name Patron address ITEM DESCRIPTION a. Author/title b. Call number or c. Journal title, volume, issue, copy number	None

FORMAT: Printed correspondence with library letterhead, standard textual statement (The following item that ha been checked out to you has been requested by another patron. Please return to the library as soon as possible. Thank you) and the description of the item below. The patron's address should be printed to appear in a standard windowed envelope.

NAME OF REPORT: ITEMS ON LOAN (INVENTORY REPORT)

FREQUENCY: Monthly or less frequently

PURPOSE: This report is sent to libraries that
                                   borrow items on interlibrary loan,
                                   and to VIP patrons who check out items
                                   on extended loan.

DATA ELEMENTS USED	COMPUTATIONS

Patron rank or title
 	
Patron name
 	
Patron address
  (contact person for libraries)
 	
ITEM DESCRIPTION
 	
a. Author/title, call
 	
b. Journal title, volume, issue
    copy number
 	
c. Free text
 	
Date item was checked out
 	
Date due (option of
  loan)
	Total number of items
	  checked out

FORMAT: Letter format with library heading. Text asks the patron
to verify the items have been borrowed and are still being used.
There is a column on the far right captioned DATE RETURNED that can
be checked if the item has been sent back to the library. The
patron's name and address are positioned for display in a windowed
envelope.

NAME OF REPORT: NOTICE OF EXPIRATION OF PRIVILEGES

FREQUENCY: Yearly

PURPOSE: This is a special report for the Army Library generated at the end of the contract year when borrowing privileges for contractors and contractor libraries expire.

DATA ELEMENTS USED	COMPUTATIONS
Expiration date of privileges	
Patron rank or title	
Patron name	
Patron address	
Contract person (for libraries only)	

FORMAT:

Two types of reports may be prepared.

a) An alphabetical list by patron name of those patrons whose privileges have expired.

b) Correspondence to the patron with library letterhead and printed message stating that privileges have expired and detailing how they may be renewed. The patron's name and address should be printed so that a windowed envelope could be used for mailing.

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4.0 REPORTS FOR PATRONS

Data contained in the bibliographic records of the ILS can be extracted to produce several reports for patrons. These include bibliographies, lists of new acquisitions and selective dissemination of information reports.

4.1 Bibliographies

These reports include subject and author bibliographies prepared for specific patrons as well as general purpose bibliographies and current issues prepared by the Reference Department for distribution. Such bibliographies can be inclusive or limited by date of publication, medium or language.

Citations in the bibliography would include complete publishing information as well as the author and title. It is also possible to include the call number or location of an item.

The bibliography itself could be in several different formats. These include the following:

- alphabetical by main entry;

- broken down by medium - books, periodicals, microform, records, etc.;

- in shelf list order (by call number);

- according to publication date.

4.2 Current Awareness Reports - New Acquisitions

A Current Awareness report in this context is a listing of acquisitions within a given period. Such reports are designed for general distribution and not tailored to meet a patron's request. Like the bibliographies described above, this listing gives the bibliographic citation: pagination is optional. The arrangement of the citations may be by subject heading, call number, media or alphabetical by main entry. Assignment by location might be used in a library

system where there were several branches or on a university campus with several libraries or special collections.

4.3 <u>Selective Dissemination of Information (SDI) Reports</u>

SDI reports are generated at the request of a patron. The subject area may be a Library of Congress (LC) subject heading or a combination of key words joined by Boolean logic. It is a listing of bibliographic citations that may be limited by date of publication, medium or language. After the initial search strategy is devised and approved by the patron, it is stored in his patron record along with his preference for the format and the frequency of updates. Subsequent SDI reports on that topic would not repeat the previous citations, but include only material acquired by the library in the interval since the last report.

NAME OF REPORT: BIBLIOGRAPHIES (general and on demand)

FREQUENCY: ---

PURPOSE: The information in the bibliographic record can be used to generate bibliographies on subjects, authors, or corporate authors. These may be general purpose bibliographies on popular subjects that are maintained by the reference section or bibliographies prepared specifically to fill a patron request.

DATA ELEMENTS USED	COMPUTATIONS
Subject headings Author Title Date of publication Place of publication Publisher Call number Pagination Medium (monograph, fiche...) Location (special collection or branch/department)	

FORMAT: Assuming that each entry in the bibliography is in proper bibliographic format, there are several ways the listing could be arranged. Some of these alternatives are given below:

    a.   alphabetical by main entry;

    b.   arranged according to date of publication with the most recent first;

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c. arranged by call number for easy retrieval;

d. arranged according to item medium, separating monographs, journals, newspapers, fiche, films, etc.

```
NAME OF REPORT:               CURRENT AWARENESS - NEW ACQUISITIONS

FREQUENCY:                    MONTHLY

PURPOSE:                      This report calls attention to new
                              library acquisitions and is avail-
                              able for distribution in the library.
```

DATA ELEMENTS USED	COMPUTATIONS
Author	
Title	
Call Number	
Edition	
Publisher	
Place of publication	
Date of publication	
Pagination	
Subject headings	
Medium	
Identification as a new item	
Location	

FORMAT: Each entry in this bibliography should include author,
title, and publishing information. Pagination and call numbers
could appear at the end of the entry. There are several ways of
ordering the actual listing. These include:

   a. alphabetical by main entry;

   b. arrangement by subject heading;

   c. arrangement by location for special collections (this is
       usually reflected in the call number); or

   d. arrangement by medium separating monographs, serials, fiche,
       records.

NAME OF REPORT: SELECTIVE DISSEMINATION OF INFORMA-
TION (SDI)

FREQUENCY: Determined by the user profile

PURPOSE: To provide bibliographic updates
tailored to patron specifications

DATA ELEMENTS USED	COMPUTATIONS
Patron's SDI profile Subject headings or descriptions Author Title Date of publication Place of publication Publisher Call number Pagination Medium Location	Total number of items reported

FORMAT: The format for this report is determined by the patron and is recorded in the patron's SDI profile. He may elect to have less than a full bibliographic citation or may omit pagination and call numbers. The order of the listing may be any of the following:

    a.   alphabetical by main entry

    b.   by date of publication

    c.   by call number

    d.   by medium

It may be desirable to include a section that would permit
him to check off the items he wished to checkout, reserve, or make
copies of.

5.0 STATUS REPORTS

These reports list those items or patrons that share a common status or characteristic. This section has been divided into item status reports and patron status reports, each of which is discussed further below.

5.1 Item Status Reports

These are essentially inventory reports. If an item is not on the shelf -- where is it? In this sense, an item -- in addition to being checked out -- may be any of the following:

- sent to bindery,

- reported missing,

- reported lost,

- on reserve,

- in storage.

There are, of course, modifications to each of the above states. For example, an item may be checked out on extended loan. Such loans may be to library staff members on VIP patrons or even to a special location such as a project office. Similarly, items on reserve may have excess reserves placed against them or the part of a reserve collection in a reading room.

The capsule reports that follow represent a sample of item status reports. They are not intended to include all possibilities, but rather represent reports most commonly used. There are other possibilities and librarians should be encouraged to regard the samples as patterns for generating their own reports.

Because these reports are similar in purpose, content and format they can be discussed as a group. The purpose is generally inventory control; statistical information on total items reported missing

during the month or quarter is incidental to the purpose of the report. Each report is concerned with the item's status and contains a description of the item. This description will vary according to the medium and may include the call number. Other elements such as medium or assigned location may be relevant. The format is a listing; the arrangement of the list (by date status set, alphabetical main entry or in shelf list order) can be determined by the library administrator.

The following reports have been described in more detail:

- List of Items Charged to Bindery;

- List of Items Overdue from Bindery;

- List of Items Reported Missing;

- List of Items Reported Lost;

- List of Items on Extended Loan.

NAME OF REPORT: LIST OF ITEMS CHARGED TO BINDERY

FREQUENCY: Year-end report

PURPOSE: To note items charged to bindery
at time of yearly inventory.

DATA ELEMENTS USED	COMPUTATIONS

Item status (bindery)
Date sent to bindery
Item description
   a. author, title, call number
   b. title, volume number
	Total

FORMAT: The listing should describe the item and indicate the date it was sent to the bindery. The list may be organized:

   a. alphabetically by main entry,

   b. separated by medium and then in alphabetical order,

   c. arranged chronologically,

   d. shelf list order.

NAME OF REPORT: LIST OF ITEMS OVERDUE FROM BINDERY

FREQUENCY: Quarterly

PURPOSE: This report identifies items that are overdue from the bindery. Procedures to expedite binding would then be initiated.

DATA ELEMENTS USED	COMPUTATIONS

Item status (bindery)
 	
Expected date of return
 	
Date sent to bindery
 	
Item description
 	
  a. author, title, call number
 	
  b. title, volume number
	Total

FORMAT: The format for this report should include the following headings:

Item Description	Date Sent	Date Due

     The order in which items are listed could be any of the following:

  a. alphabetical by main entry,

  b. divided into monographs and serials, alphabetical by main entry within each division,

c. arranged by date item was sent to bindery, the earliest date first,

d. shelf list order (by call number).

NAME OF REPORT: LIST OF ITEMS REPORTED MISSING

FREQUENCY: Monthly, quarterly or annually

PURPOSE: This report acts as a "snag file"
                                   (file of items that cannot be
                                   processed normally) to identify
                                   items reported missing and to
                                   facilitate the search for the
                                   item whether in the stacks or at
                                   other locations. Change in status
                                   from "missing" to "lost" is deter-
                                   mined by library policy.

DATA ELEMENTS USED	COMPUTATIONS
Item status (missing)	Subtotals
Item description	Total
a. author, title call number	
b. title, volume, issue-part, reference or circulation copy date item reported missing messages*	

*May be used to record dates and search strategy for the item.

FORMAT: Since this report is used to search for the missing items,
it should be arranged to aid in that search. Assuming the following
column headings -- item description, date reported missing and
messages -- the list could be arranged shelf list order or by type
of material. Where there are separate collections or branch
libraries the list could be separated by location and then arranged
by call number or medium.

NAME OF REPORT: LIST OF ITEMS REPORTED LOST

FREQUENCY: Monthly, quarterly or annually

PURPOSE: This list tracks both the number and
                          type of item reported lost. It may
                          be used for acquisitions if the
                          item is considered necessary for
                          the collection. The status "lost"
                          is assigned to an item by the li-
                          brary staff following their own
                          procedures.

DATA ELEMENTS USED	COMPUTATIONS
Item status (lost)	Total
Item description	Subtotal
Item ID	
Date of publication	
Date reported lost	
Total number of uses	
Number of additional copies	
Messages*	

*Messages may include whether the item was lost by a patron, or
not found during inventory.

FORMAT: A format for the monthly (or quarterly) and annual reports
is shown on the following pages. The lists may be arranged in any
of the following orders and columns adjusted accordingly.

    a. date item reported lost,

    b. shelf list order (or location),

    c. medium

The annual report should include a total of lost items reported
for each period of the year (month or quarter) as well as a total
for the year.

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LIST OF LOST ITEMS:

DATE REPORTED LOST	ITEM DESCRIPTION	DATE OF PUBLICATION	NUMBER OF USES	NUMBER OF MULTIPLE COPIES	MESSAGES

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NAME OF REPORT: LIST OF ITEMS ON EXTENDED LOAN

FREQUENCY: End of the year

PURPOSE: This report would be part of a general inventory.

DATA ELEMENTS USED	COMPUTATIONS
Item status	Total
Date checked out	Subtotal
Date due - (extended)	
Item description	
a. author, title call number	
b. title, volume	
c. other	
Medium	
Number of multiple copies	
Patron to whom checked out (optional)	

FORMAT: This report could be formatted in any of the following ways:

a.

Item Description	Date Checked Out	Number of Multiple Copies	Patron to Whom Checked Out
(arranged alphabetically by main entry or divided by medium)			(optional)

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b.

Item Description	Date Checked Out	Number of Multiple Copies	Patron to Whom Checked Out
shelf list order with separate break-out for special collection			

c.

Patron	Items	Date Checked Out	Number of Multiple Copies
(alphabetical by patron's last name)			

5.2 Patron Status Reports

Two of these reports -- List of Registered Borrowers and List of Patrons Whose Privileges have expired -- were discussed as part of the system backup. Additional reports on patron status might include the following:

- List of Delinquent Borrowers

- List of Libraries Participating in Interlibrary Loan

- List of VIP Patrons

If there are several categories of users with privileges dependent upon the classification, it might be necessary to have a report on these.

The purpose of patron status reports is system back-up as discussed in Section 2.0. The List of Delinquent Borrowers would be necessary for control, particularly where there was no automatic restruction of privileges. (The system could automatically restrict privileges after N books had been checked out or X dollars were owed on fines.) Changes in loan policies or fees could require notification of cooperating libraries. And, of course, these lists (particularly VIP Patrons) could be used for public relations.

NAME OF REPORT: LIST OF LIBRARIES PARTICIPATING IN
                                   INTERLIBRARY LOAN

FREQUENCY: Annual or as needed

PURPOSE: To identify the libraries that borrow
                                   items particularly those whose pri-
                                   vileges are limited.

DATA ELEMENTS USED	COMPUTATIONS
Patron name, address	Subtotals
Point of contact	Totals
Expiration date (if applicable)	
Category of library (if appli- cable)	
Number of uses	
Associated messages	

FORMAT: Listing of the library's name and contact person. The list
could be arranged.

   a. alphabetically by library name,

   b. according to library category (i.e., Federal, Army,
       contractor),

   c. ranked by the number of uses,

   d. by geographical area.

This listing can be divided into separate reports to show, for
example, contractor libraries whose privileges may be ready to
expire.

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NAME OF REPORT: LIST OF VIP PATRONS

FREQUENCY: As needed

PURPOSE: To identify VIP patron (trustees, library associates, officers of the company) for purposes of granting special privileges or for public relations.

DATA ELEMENTS USED	COMPUTATIONS
Patron name, address Patron status (VIP)	

FORMAT: List of patrons arranged alphabetically by patron's last name.

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NAME OF REPORT: LIST OF DELINQUENT BORROWERS

FREQUENCY: Monthly or as needed

PURPOSE: This report is used to restrict privileges for patrons who have excessive fines or overdue books. The library administration may wish to review the list before revoking or limiting privileges.

DATA ELEMENTS USED	COMPUTATIONS

Patron name
 	
Fines owing
 	
Associated messages
  (would give reason
  for delinquency)	

FORMAT: An alphabetical list of patrons with a column showing the reason for delinquency.

6.0 ACTIVITY REPORTS

These reports monitor the activities of the circulation and re-
ference sections. Although there are three separate reports, they are
very similar in function and formats. Therefore, they will not be
discussed separately.

The reports are statistical only in the sense that subtotals,
totals and percentages are given and that they compare this year's
activities to last year's. There is no attempt at analyses. Increases
in patron registration, for example, are not related to increases in
the number of reserves placed.

On the report summaries which follow, the activities listed repre-
sent both those recorded on the transaction log and some input by the
library staff. For example, the log will automatically record the
number of items checked out; however, if the number of citations given
given by the reference librarian is desired, this data will have to
be entered by a staff member. The list of activities is fairly ex-
tensive for each of the three reports and provides for expansion if
desired. A library might wish to track circulation of various media --
filmstrips, records or fiche. On the other hand, it is possible to
combine activities, and this would be recommended for the quarterly
or yearly reports.

Where data about services is entered by staff it is possible to
add information about patrons. The Army Library, Pentagon includes the
service by which reference requests are made; this is useful informa-
tion for funding. A university library might wish to distinguish among
undergraduates, graduate students and faculty. If this information is
required, an entry screen including this information would have to be
designed. Since this is not normally apart of the activity reports,
no breakdown by patron class is shown.

Formats for the reference, circulation and system activity reports
are similar. The list of activities is selected from the "Data Elements

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Used," column headings are given as well. One column heading requires
explanation. "Percentage of Total Activity" can be added to the report.
However, this percentage refers only to the number of transactions and
not to the time involved. It might, therefore, give misleading informa-
tion -- indicating, for example, that the reference section spent more
time processing loan requests than preparing bibliographies.

Summaries of each series of reports follow.

NAME OF REPORT: CIRCULATION ACTIVITY REPORT

FREQUENCY: Daily, weekly, monthly, annually
or on demand

PURPOSE: To enable the library administrator
to monitor circulation activities.

DATA ELEMENTS USED	COMPUTATIONS

Check-outs
 	
    Total
    By category (monographs,
      periodicals, or short-
      term, extended records,
      and regular loan periods)
 	
Check-ins
 	
    Total
    Number overdue at time of
      check-in
 	
Reserves placed
 	
Notices Sent
 	
    Overdues
    Delinquent borrower letter
    Recall notices
    Reserve notices
    Fine notices
 	
Fines taken in
 	
Interlibrary loan activity
 	
    Requests received
    Returnable items loaned
    Non-returnable items loaned
            TOTAL LOANS
	Total
	Subtotal
	Percent

Requests made
Returnable items received
Non-returnable items re-
    ceived
        TOTAL BORROWING
 	
Status checks
*Snags set
*Snags found
 	
Internal circulation
   (broken down by type)	

*Snag refers to items that cannot be processed normally, i.e., lost items.

FORMAT: The daily report is a display on a CRT showing the previous day's activities. The weekly, monthly and yearly reports may be printed. The libraries operating on a quarterly system, there would be a quarterly report. It should be possible to combine circulation activities to show totals for internal circulation, interlibrary loan, and normal circulation. Formats for the reports are given below:

a. Report of Daily Circulation Activities:

Type of Activity	Total Number of Transactions	Percent of* Circulation Activity

*The percentage of circulation activity refers to the number of transactions. It would be useful to know what percentage of its items returned were overdue or what percentage of inter-library loan requests were for non-returnable items (usually photocopies).

b. **Report of Weekly Circulation Activity:**

Type of Activity	Mon.	Tues.	Wed.	Thurs.	Fri.	Sat.	Sun.	Weekly Total

c. **Report of Monthly Circulation Activity:**

Type of Activity	1st Week	2nd Week	3rd Week	4th Week	5th Week	Monthly Total

d. **Report on Year's Circulation Activity:**

Type of Activity	Jan ———————————— Dec *	Yearly Total

*For libraries operating on other than a calendar year the order of
the months could be rearranged. Also, where quarterly reports were
used, the yearly report could indicate activities for each quarter
rather than each month.

e. Circulation Activities to Date:

Type of Activity	Number of Transactions During Period [*]	Total Transaction to Date	Last Year's Total

[*] The register for the period -- month or quarter -- would be predetermined; the heading would then read "transactions for the month."

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NAME OF REPORT: REFERENCE ACTIVITY REPORT

FREQUENCY: Daily, weekly, monthly, annually
                                   or on demand

PURPOSE: To enable the library administrator
                                   to monitor reference services to
                                   patrons. For Army Library this is
                                   required for the Monthly Activity
                                   Report. Reference librarians input
                                   their activities daily using a screen.

DATA ELEMENTS USED	COMPUTATION
Short questions answered	Subtotals
Lengthy questions (30 min +) answered	Totals
Citations given	Percent (optional)
Bibliographies prepared:	
a. general purpose	
b. on demana	
SDI profiles established	
SDI reports sent	
Searches of data base	
Interlibrary loan requests processed	
a. for patrons	
b. from other libraries	

FORMAT: The daily report is a summary of individual reference
librarians daily input. This report may use either of the follow-
ing formats displayed on a CRT. The weekly monthly or annual
reports may be printed.

a. Summary Report of Daily Activities:

Type of Activity	Total Number of Actions	% of Reference Activity*
Total Activity	_____	100%

*
The percentage of reference activity refers only to the number of
reference actions and not to the time involved. Obviously, it would
take longer to prepare a bibliography than to process an interlibrary
loan request. The percentage may be included on all of the follow-
ing reports as well.

b. Daily Reference Activities:

Type of Activity	Librarian A	Librarian B ...	Total Number of Reference Actions
TOTAL			_____

This information would be available from the reference input screen.

c. Weekly Reference Activity:

Type of Activity	Mon.	Tues.	Wed.	Thurs.	Fri.	Sat.	Sun.	Weekly Total

d. <u>Monthly Report on Reference Activity</u>:

Type of Activity	1st Week	2nd Week	3rd Week	4th Week	5th Week	Monthly Total

e. <u>Yearly Report on Reference Activity</u>:

Type of Activity	Jan ─────── Dec*	Yearly Total

*For libraries operating on other than a calendar year the order
of the months could be rearranged.

   It might be preferable to insert a quarterly report and have
the yearly report reflect the activities of each quarter.

f. <u>Reference Activity to Date</u>: (for display only)

Type of Activity	Subtotal for this Period*	Total to Date	Last year's Total

*The register for the period -- month or quarter -- would be predeter-
mined and the heading could then read "activities for the quarter."

NAME OF REPORT: SYSTEM ACTIVITY REPORT

FREQUENCY: Daily, weekly or on demand

PURPOSE: To enable the library administrator to monitor records added, modified or deleted.

DATA ELEMENTS USED	COMPUTATIONS
Records added	Subtotal
Patron records	Total
Bibliographic records	
a. from OCLC tapes	
b. retrospective	
Activity	
Records modified or updated	
Patron	
Bibliographic	
Records deleted	
Patron (broken down by reason - non-use, delinquency)	
Bibliographic	
Number of items barcoded	

FORMAT: This report probably will be displayed on the CRT. The screen should display three columns: the activity, the subtotal, and the total. The formats for weekly, monthly and yearly reports would be similar to those for Circulation and Reference.

7.0 REPORTS FOR EVALUATING LIBRARY SERVICES

These reports, which are derived from circulation statistics and data entered by the library staff, should assist the administrator in evaluating the collection, determining how it is used and who is using it.

7.1 The Structure of the Collection

Reports on the structure of the collection can not only give the holdings for each classification category of the library (fiction, history, literature), but can also indicate the currency of the collection and the pattern of acquisition. In fields such as computer science, the item's date of publication is critical; a collection of books in this area all published before 1970 does not provide good service to the patron regardless of how large the collection may be. The following reports can be used to assess the structure of the collection.

- Holdings by classification

- Year's acquisitions by classification

- Breakdown of Holdings by Classification and year of publication

7.1.1 Holdings by Classification

This is a statistical report showing the number of items held by the library in each classification category. The categories are to be determined by the library administrator: they may be fairly broad (LC categories A - General Works) or narrow (LC F2201-2239- South America). It is possible to determine the holdings for a broad area (American History) and then to divide it into subcategories (American Revolution, Civil War, World War II) either within the body of the main report or in a separate breakdown.

It is also possible to consider items in special collections or at branches both separately and as part of the system.

The arrangement of the report could be in classification order (with subcategories) or the groups could be ranked according to the number of items held.

7.1.2 Report on the Year's Acquisitions by Classification Group

This report should indicate how the collection has grown over the past year. The report can also show the range of publication dates for the items acquired. In this way the currency of recent acquisitions can be monitored.

7.1.3 Breakdown of Holdings by Classification and Year of Publication

Since neither the size of the collection nor its spread over various classification groups is an accurate measure of the value of the collection, this report adds the criterion of currency. Currency, particularly in the sciences, is a measure of the library's ability to provide service. Obviously not all older works are outdated or useless; however, this report should be used to spot areas of the collection that should be reviewed.

It probably will not be useful to do this report for the entire collection -- certainly not every year. A section of the collection, however, could be studied. Also the report should not list every possible year of publication. It would be better to consider the dates of publication in five year increments.

NAME OF REPORT: HOLDINGS BY CLASSIFICATION

FREQUENCY: As needed

PURPOSE: To help evaluate the shape of the collection by identifying areas of weakness (few holdings) and strength.

DATA ELEMENT USED	COMPUTATIONS
Classification number	Subtotals
Prose statement describing the classification group or subcategory	Total
	Percentage

FORMAT: The report could follow either of the two formats outlined below.

a. <u>Breakdown of Holdings by Classification Number</u>

Classification Group	Description	Number of Items Held	Percentage of Total Collection
A	General Works		
B			
I			
Z			
Including Subgroups			

b. Ranking by number of items per classification group.

Rank	Classification Group	Description	Number of Items Held	Percentage of Total Collection
1	P	Language & Literature		

NAME OF REPORT: REPORT ON YEAR'S ACQUISITIONS
                                           BY CLASSIFICATION GROUP

FREQUENCY: Annually

PURPOSE: To monitor the growth of the
                                         collection.

DATA ELEMENTS USED	COMPUTATIONS
Date of record entry (to identify new item) Classification number Date of publication	Subtotal Total Percentages

FORMAT: Two formats are shown below. The first gives only the
gross figures for each category. The second attempts a breakdown
by publication date.

a.

Classification Group	Description	Number of Items Acquired	Percentage of Total Acquisitions
Total		----	100%

b.

Classification Group	Publication Date				Total	Percentage of Total Acquisition
	Current Year	Last Year	3-5 Years	Over 5 Years		
Total						100%

NAME OF REPORT: BREAKDOWN OF HOLDINGS BY
                                 CLASSIFICATION AND YEAR OF PUB-
                                 LICATION

FREQUENCY: As needed

PURPOSE: This report could be generated for
the collection as a whole or for
any part to evaluate the currency
of the holdings, remembering that
currency is only one criteria of
evaluation.

DATA ELEMENTS USED	COMPUTATIONS
Classification group or subgroups Date of publication	Subtotals Totals Percentage

FORMAT: The arrangement of this report could vary depending on
whether the entire collection were being considered or one
classification group. The following page gives a sample
report for a section of the collection.

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BREAKDOWN OF HOLDINGS BY CLASSIFICATION

AND YEAR OF PUBLICATION

CLASSIFI-CATION NUMBER	DESCRIPTION	TOTAL ITEMS IN COLLECTION	YEAR OF PUBLICATION*									
			1975-1978		1970-1974		1965-1969		1960-1964		1950 ---	
			SUB TOTAL	%	SUB TOTAL	%	SUB TOTAL	%	SUB TOTAL	%	SUB TOTAL	%
Q	SCIENCE											
QA	MATHEMATICS											
QA 76	COMPUTER SCIENCE, ELECTRONIC DATA PROCESSING											
QB	ASTRONOMY											
QC	PHYSICS											
QD	CHEMISTRY											
QE	GEOLOGY											
QH	NATURAL HISTORY											

*Time increment determined by library staff.

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7.2 Use of the Collection

Measurement of patrons' use of library materials is always difficult. Books may be checked out of the library and never read; on the other hand, some items are used in the library and never checked out. A film selected by a patron may be reviewed by himself or shown to a group of people. Nor is there any way to determine the value of a library item to the patron using it. Recognizing these limitations, the reports for the ILS measure use in terms of the number of items checked out of the library, the number of times items circulate internally, and the number of items not circulating at all.

It is also possible to determine how the collection is used and when. For example, using two-hour increments the system could record the highest, lowest and average number of transactions during a period. The highest and lowest could be identified by the date. Similar computations could be done for the day, the week, or the month. This assumes there is a pattern to demand for services that can be determined.

The reports that follow represent the type of information that can be collected. (For example, the report on the Use of Foreign Language Material serves as a model for any part of the collection.) They include the following:

- Breakdown of Circulation by Classification,

- Comparison of Circulation to Holdings,

- Ranking of Periodical by Use,

- Report on Non-Circulating Materials,

- Use of Foreign Language Materials.

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7.2.1 Breakdown of Circulation by Classification

This report is common to all libraries, it matches the
number of circulation actions occuring during a period (day, week,
month or year) with a part of the collection. The categories are
defined by classification number and are usually predetermined.
The ILS includes a separate figure for internal circulation, that is,
for items used within the library and not checked out.

7.2.2 Comparison of Circulation to Holdings

This report uses the classification categories defined for
showing the structure of the collection and matches them to the
figures from the above report. The objective is to show the per-
centage of items circulating. It is also possible to determine
the items in a collection that account for the bulk of the cir-
culation; this feature is shown in the Annual Report on Circulation
by Classification.

7.2.3 Ranking of Periodicals by Use

The ranking of periodicals requires data on circulation within
the library as well as on items checked out. The report is primarily
concerned with the use of loose copies and not volumes or bound
periodicals. Although the ILS collects data on individual copies,
the information for the report is by title. For purposes of com-
parison these titles are identified by their frequency of publication
(daily, weekly, monthly or quarterly).

7.2.4 Report on Non-Circulating Material

This is a listing or status report on all items that have not
circulated during the year. Although its format is that of a
status report it is included in this section because it is part of
the evaluation of the collection. This list might be used to select
items for storage or for removal from the collection.

7.2.5 Use of Foreign Language Materials

This report examines the use of part of the collection not
bounded by classification numbers. That is, it reports on use of
foreign language materials in all disciplines, broken down by lang-
uage.

NAME OF REPORT: CIRCULATION BREAKDOWN

FREQUENCY: Weekly, monthly and annually

PURPOSE: This report is used to determine
                                   how various sections of the library
                                   are being used. It will record
                                   both circulation outside the li-
                                   brary and in-house use.

DATA ELEMENTS USED	COMPUTATIONS
Call number	a) Subtotals for classification group
Language	b) Totals
Location or identification	c) Percentage of total circulation for each classification grouping
Year of publication	d) Percentage of holdings actually circulating
Year of record entry	
Number of uses	
Subject heading	

FORMAT: The usual organization of circulation statistics is by
classification category showing the total number of items circula-
ting. The format for the weekly, monthly and yearly report is shown
below.

Classi-fication Category	Description	Number of Transaction			Percentage of Circulation
		Total	Checkouts	In-house	

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NAME OF REPORT: COMPARISON OF HOLDINGS AND CIRCULATION

FREQUENCY: Yearly

PURPOSE: This report compares the figures from the Report on the Structure of the Collection with those from the Breakdown of Circulation. It also notes the number of items circulating as a piece of information separate from total circulation

DATA ELEMENTS USED	COMPUTATIONS
Classification number	Subtotal
Number of uses	Totals
or	Percentage
Date item last used	

FORMAT: Two versions of this report are shown on the following pages. The first notes the number of items with recorded used and the second indicates number of uses. The classification categories could be listed in shelf list order; special collections could be listed at the end.

COMPARISON OF HOLDINGS TO CIRCULATION

a.

Classification Category	Description	Number of Items *	Number of Circulation Actions**	Number of Items With ** Recorded Use	Percentage of Items Circulating

*From Report on the Structure of the Collection

**From Breakdown of Circulation

***Uses data element - date item last used

COMPARISON OF HOLDINGS AND CIRCULATION

b.

Classification Category	Description	Number of Items *	Number of Circulation Actions	Number of Times Item Circulated***						Percentage of Items Circulating
				0	1	2	3	4	5+	

*From Report on the Structure of the Collection

**From Breakdown of Circulation

***Use data element - number of uses

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NAME OF REPORT: RANKING OF PERIODICALS BY USE

FREQUENCY: Yearly

PURPOSE: To evaluate the use of periodicals

DATA ELEMENTS USED	COMPUTATIONS
Title Frequency of publication Number of uses	Subtotal Total

FORMAT: The titles in this report may be ranked by number of uses or the report may be subdivided according to frequency of publication and ranked by use within each category.

Rank	Title	Number of Recorded Uses	Frequency

NAME OF REPORT: NON-CIRCULATING ITEMS

FREQUENCY: Yearly

PURPOSE: To enable the library staff to examine materials retained by the library which have not been used during the preceding year. These items might be eliminated from the collection or moved to storage.

DATA ELEMENTS USED	COMPUTATIONS
Item description inc. publication date Classification number Date last used Number of uses Number of multiple copies	Subtotals Totals Percentages

FORMAT: This report lists items in the collection that have not circulated during the year. Since the list may be used for weeding, the items are listed in the order they would appear on the shelves.

Classi-fication Number	Item	Date Last Used	Date of Publication	Number of Multiple Copies

NAME OF REPORT: USE OF FOREIGN LANGUAGE MATERIALS

FREQUENCY: Yearly

PURPOSE: To determine how foreign language materials are used.

DATA ELEMENTS USED	COMPUTATIONS
Language Classification number Number of uses	Total Subtotal

FORMAT: The report should indicate the language, and the total holdings of the library in that language. It is possible to break these holdings down by classifications.

Language	Classification Group	Holdings	Number of Items Circulating

7.3 Users Studies

Users' surveys attempt to identify the type of patrons who uses the library, and in some cases, who does not use the library. Patrons may be identified in a number of ways -- by organizational affiliation, for example. These descriptions must be built into the patron record at the time the system is planned. Collection and management of this information must respect privacy concerns.

The following sections are examples of a users' survey derived from the Army Library's reports.

NAME OF REPORT: USER'S SURVEY

FREQUENCY: As required

PURPOSE: To determine what types of borrowers use the library and how often

DATA ELEMENTS USED	COMPUTATIONS
Patron categories	Totals
Number of uses	Subtotals
Type of use*	Percentages

*Type of use is input by reference libraries

FORMAT: See the following.

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USERS SURVEY

REPORT ON NON-USERS

NUMBER

NUMBER OF REGISTERED BORROWERS _____

NUMBER OF NON-USERS (Registered borrowers who have not checked items out in the library during the year) _____

NON-USERS AS A PERCENT OF REGISTERED BORROWERS _____

TYPE OF BORROWER	# OF NON-USER FOR EACH CATEGORY	% OF NON-USERS	ACCORDING TO RANK					
			I	II	III	IV	V	VI
REGULAR MILITARY								
ARMY								
AIR FORCE								
MARINE								
NAVY								
DOD CIVILIAN								
OSD								
JCS								
RETIRED MILITARY								
ARMY								
AIR FORCE								
MARINE								
NAVY								
OTHER BORROWERS								
TEMPORARY								
STUDENTS								

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USERS SURVEY

REPORT ON REGISTERED BORROWERS

PATRON RECORDS AT BEGINNING OF THE YEAR   NUMBER ___
PATRON RECORDS ADDED ___
PATRON RECORDS DELETED ___
CURRENT NUMBER OF REGISTERED BORROWERS ___

TYPE OF BORROWER	TOTAL FOR EACH CATEGORY	% OF REGISTERED BORROWERS	ACCORDING TO RANK					
			I	II	III	IV	V	VI
REGULAR MILITARY								
ARMY								
AIR FORCE								
MARINE								
NAVY								
DOD CIVILIAN								
OSD								
JCS								
RETIRED MILITARY								
ARMY								
AIR FORCE								
MARINE								
NAVY								
OTHER BORROWERS								
STUDENTS								
TEMPORARY								

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USERS SURVEY

REPORT ON USAGE - REFERENCE

TYPE OF BORROWER	NUMBER OF REFERENCE ACTIONS	SHORT QUESTIONS	LENGTHY QUESTIONS	BIBLIO-GRAPHIES	ON-LINE SEARCHES	SDI PROFILES	SDI REPORTS
REGULAR MILITARY							
ARMY							
AIR FORCE							
MARINE							
NAVY							
DOD CIVILIAN							
OSD							
JCS							
RETIRED MILITARY							
ARMY							
AIR FORCE							
MARINE							
NAVY							
OTHER BORROWERS							
TEMPORARY							
STUDENTS							

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NAME OF REPORT: REPORT ON INTERLIBRARY LOAN

FREQUENCY: As needed

PURPOSE: To ascertain the amount of inter-
library loan activity by type of
library. If the number of libraries
participating in interlibrary loan
is not large, this report could
give the information for each
library.

DATA ELEMENTS USED	COMPUTATIONS
Identification as a library Type of library Number of uses	Totals Subtotals (for each category)

FORMAT: The report on interlibrary loan can use the following
headings.

TYPE OR NAME OF LIBRARY	NUMBER OF CIRCULATION USES (LOANS)	REFERENCE ACTIONS PERFORMED[*]	NUMBER OF ITEMS BORROWED[**]

[*]Input by reference librarians

[**]Would have to be input

8.0 SUMMARY

The circulation module of the Integrated Library System is capable of accumulating statistics on circulation activity and use of specific items. It also generates correspondence for overdues and reserve notices. No set of reports can meet the need of every library. Implementation of the ILS will require that the library staff consider its own reporting needs. Patron and items records can then be adapted if necessary to provide the needed data and appropriate register set to accumulate quantitative data.

DA
FILM